

Filtered Ordering

| Filter a suggested order down to just what you need.

Step-by-step walkthrough ~3 min read Companion to the Filtered Ordering video

When it's time to restock, you know what you need. But letting Rundoo generate a purchase order for the whole store at once can hand you a list a mile long. It's accurate, it's just not focused. Some days you only want to buy for one aisle, top up a single brand, or stock up for a weekend sale, without sifting through everything else. Filtered ordering adds a review step between "generate" and "ordered" so you can narrow that big suggested list down to just the slice you're buying. This one came straight from a hardware store owner using Rundoo, and our own Jacob Hanzel helped build it.

WHERE IT HAPPENS

The review step, right after Generate order

Everything here lives inside the order builder: in **POS** mode, click **Orders** in the left sidebar, then the **New** tab. Pick who you're buying from under **Order from**, and click **Generate order**. Rundoo no longer drops the whole restock straight into your cart. Instead it shows you the suggested products first, with filters across the top, so you decide what actually makes the order. Nothing is committed until you say so.

DO THIS

Filter a generated order, step by step

1

Start the order and click Generate order

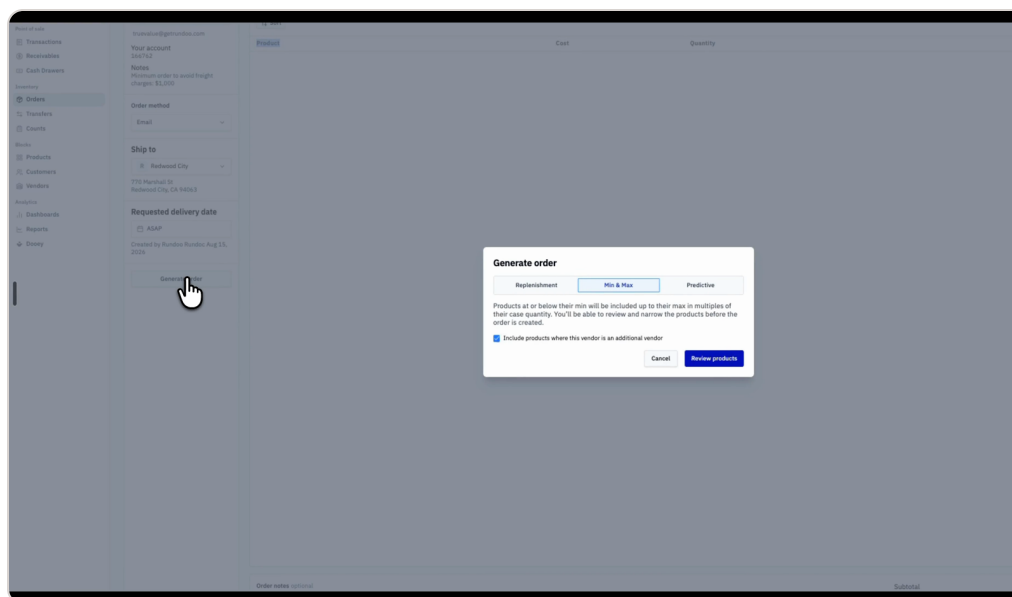
From **POS → Orders → New**, choose a vendor under **Order from**. That unlocks the builder. Now click **Generate order** in the left side panel to let Rundoo work out a full restock from your sales and stock levels.

2

Pick a method and your vendor scope

A short window opens. Choose how Rundoo builds the list: **Replenishment**, **Min & Max**, or **Predictive**. Filtered ordering works with all three, so pick whichever you normally use for this vendor.

See the checkbox **Include products where this vendor is an additional vendor**? Leave it on to cast a wide net, or **uncheck it** to keep the list to products where this vendor is your primary source. Then click **Review products**.



Pick your generation method, decide whether to include products where this vendor is only an additional source, then click Review products.

3

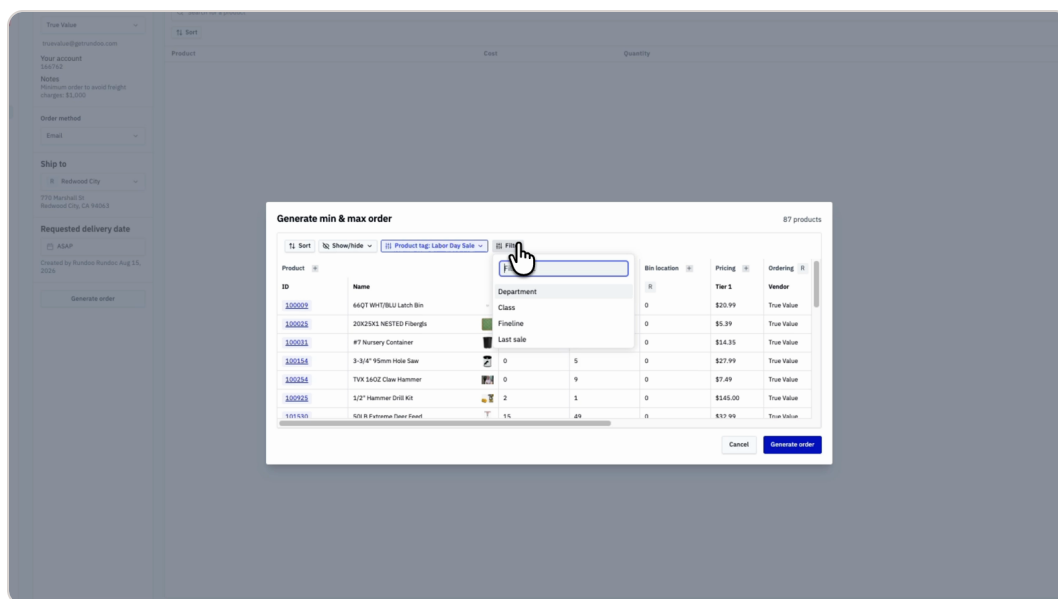
Review before it becomes an order

Instead of a finished PO, you land on a review screen showing the entire suggested order. Across the top sit **Sort**, **Show/hide** columns, and **Filter**. Look it over. For a busy store this list can run long, which is exactly what the next step is for. Nothing has been created yet.

4

Filter down to the slice you're buying

Click **Filter** and narrow the list to just what you want. Buying for an upcoming promotion? Pick a **Product tag**, say a Labor Day sale, and the list shrinks to only those items. Restocking one part of the store? Get as specific as **Department**, **Class**, **Fineline**, or **Last sale**. Stack a few together to zero in on exactly the aisle you have in mind.



The Filter menu narrows a big suggested order by product tag, department, class, fineline, or last sale, so you buy for one aisle or one sale at a time.

5

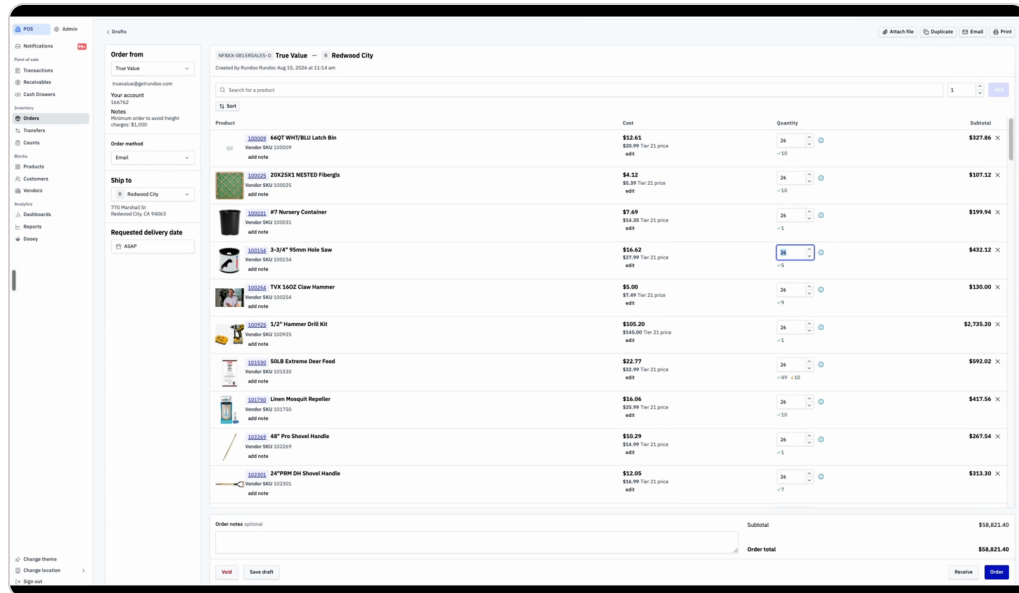
You still control every line

Filtering never takes the decision out of your hands. Change any **Quantity** up or down, override a cost, or if something slipped in that you don't want, click the **x** on its row to drop it. What you see is what you'll order.

6

Create the focused order

When the list looks right, click **Generate order** to build the PO from just those lines. You can go from a suggested list of hundreds down to the handful you actually wanted. From there, save it as a draft or send it to the vendor, same as any other order.



Your focused order lands in the builder, every line still editable. Adjust a quantity, drop a row, then Save draft or Order it.

KEEP IT HANDY

Filtered ordering at a glance

WHERE

POS → Orders → New

Pick a vendor, then Generate order.

WORKS WITH

All three methods

Replenishment, Min & Max, or Predictive.

FILTER BY

Tag, dept, class, fineline, last sale

Stack a few to zero in on one aisle.

PRIMARY VENDOR ONLY

Uncheck the box

"Include products where this vendor is an additional vendor."

Good to know

- Nothing is created until you click **Generate order** on the review screen. Filtering and quantity tweaks are all safe to play with first.
- Filters stack. Pick a **Department** and a **Product tag** together to land on just the sale items in one part of the store.
- Buying for a promotion? Tag those products first (see the *Group It, Find It* video), then filter the generated order by that tag.
- The vendor checkbox is the quick way to stop an order from filling up with items this vendor only carries as a backup source. Uncheck it to keep things to your primary lines.
- This is your practice store, so generate and filter all the orders you like. Nothing leaves the building until you send it.